DOCUMENT RESUME

ED 312 736 EA 021 358

TITLE	Evaluation of Chief Executive Officers in Canadian School Boards. CEA Information Note.
INSTITUTION	Canadian Education Association, Toronto (Ontario).
PUB DATE	Sep 89
NOTE	32p.
AVAILABLE FROM	Publications, Canadian Education Association, 252 Bloor Street West, Suite 8-200, Toronto, Ontario M5S 1V5, Canada ($3.00 prepaid).
PUB TYPE	Tests/Evaluation Instruments (160) -- Reports - Research/Technical (143)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Administrator Attitudes; *Administrator Evaluation; *Boards of Education; *Educational Quality; Elementary Secondary Education; *Evaluation Methods; Foreign Countries; Measurement Techniques; Questionnaires; *Superintendents
IDENTIFIERS	*Ontario

ABSTRACT

The Canadian Education Association (CEA) examined the procedures Canadian School Boards use to evaluate their chief executive officers. In March 1989, CEA sent a questionnaire to superintendents and directors of education of the school boards that subscribe to the CEA Information Service, as well as to others. Of the 123 questionnaires sent, 81 responses were received, and of these, 21 indicated that they did not evaluate their CEOs even informally. Two-thirds of the CEOs (54) had contracts, and of these, 46 were evaluated by their boards. Fewer than one-third of the responding school boards had a formal evaluation form. There are three main levels of evaluation: (1) formal evaluation using a standard evaluation instrument, often with a quantifiable rating scale; (2) formal evaluation using descriptive guides but without a standard model or set form; and (3) informal evaluation, using neither guides nor models. A list of respondents, data tables, and sample evaluation models are appended. (SI)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED312736

CEA Information Note

Canadian Education Association / Association canadienne d'éducation

Evaluation of Chief Executive Officers in Canadian School Boards

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Harriett Goldsborough

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Name	1	2	3	4	5
A. Board Relations and Responsibilities					
1. Prepares carefully for board meetings					√
2. Provides ample information to enable board members to make decisions					√
3. Keeps board fully informed about school operations					√
4. Interprets board policies to staff				√	
B. Community and Public Relations					
1. Handles media relations skilfully					√
2. Maintains good relations with local government leaders					√
3. Interprets district problems and concerns to community and public					√

September 1989

Contents

Introduction	/2
Contracts and CEOs	/4
Evaluation	/4
Evaluating and Contracts: A Comparison	/4
Evaluation Models and Guidelines	/5
Levels of Evaluation	/6
Models: Rating Scales	/6
Qualitative Comments	/7
Categories of Questions	/8
Qualities and Attributes or Objectives ?	/9
Management By Objective	/9
Frequency of Reviews	/10
Evaluation: Who Requests It?	/11
Who Participates in the Review?	/11
A Few Other Factors	/12
Conclusion	/13
Suggested Readings	/13
School Boards Replying to Questionnaire	/14
Appendices	/17

Suite 8-200, 252 Bloor Street West, Toronto, Ont. M5S 1V5

BEST COPY AVAILABLE

EA 021 358

INTRODUCTION

THE PRIMARY motivation behind this report was the desire to know how chief executive officers of Canadian school boards were evaluated across the country. Keen interest in this subject was expressed in several quarters. The Canadian Education Association had received many requests for information and most of these wanted concrete examples of evaluation models from which they could adapt their own personalized instruments.

With this in mind, in March 1989 CEA sent a questionnaire on this topic to the superintendents and directors of education of the school boards that subscribe to the CEA Information Service, as well as to other selected boards in the ten provinces and two territories. The short questionnaire included eleven questions which asked school boards if they evaluated their CEOs, how the procedure was carried out and who was involved.

CEA sent out 123 questionnaires and received 81 replies (66% response). Of these, slightly less than half (36) sent some form of documentation, ranging from a paragraph or two on the need for evaluations, to exhaustive, sophisticated evaluation instruments with policy statements and guidelines. Twenty-six school boards supplied evaluation models, with a combined total of nearly 1000 questions.

SCHOOL BOARDS RESPONDING TO THE CEO EVALUATION QUESTIONNAIRE

	Questionnaire Replies	Sent	%	Models	Guides
NWT	1	1	100	1	0
NFLD	4	5	80	1	0
PEI	2	4	50	0	1
NS	4	5	80	2	0
NB	8	11	73	2	1
QUE	5	16	31	0	2
ONT	19	27	70	6	0
MAN	7	11	64	2	0
SASK	5	9	56	1	3
ALTA	17	20	85	9	2
BC	9	14	64	2	1
TOTAL	81	123	66	26	10

Because an integral part of the planning and evaluation process is the actual instrument, we have included three typical examples of evaluation models in Appendix 5.

The model from Yellowknife (NWT) is the longest of all the evaluation questionnaires received (73 questions) and is one of the most complete models.

The model from Winkler (Man.) has been included because of its competent outline of the characteristics that might be desired in a chief executive officer.

The performance review from Dartmouth (N.S.) is a large and comprehensive model, and it has been included because of its high quality and also because so many other models resemble it. (See Appendix 6 for a comparison of six similar models.)

These three evaluation models should prove helpful to any school board wanting to start an evaluation program as well as to those school boards that wish to revise their procedures. All of these models (and many others received by CEA) are excellent. However, it must be remembered that these models were developed for specific local conditions, and should be revised or adapted, not used unchanged.

Ron Edwards
Information Officer
Canadian Education Association

CONTRACTS AND CEOS

EAST IS EAST, and west is west. Is that why none of the responding CEOs in New Brunswick and Quebec has a formal contract with their school boards, but all those who replied from British Columbia and Saskatchewan have them? Only one CEO in Alberta and two in Manitoba report having no contract. (See Appendix 1).

As is often the case, Ontario is the swing province; the transition between eastern Canada where few CEOs have contracts, and the west, where virtually all do. Seven of the 19 (37%) Ontario school boards replying to the CEA questionnaire sent out in March,1989, do not have contracts. Most of these are in eastern Ontario - Brockville, Ottawa, Pembroke and Timmins - but the others are spread across the province - Mississauga, Guelph and Windsor.

In all, 54 CEOs reported having contracts. The percentage, and the absolute numbers, of CEOs with contracts increases dramatically as one proceeds west. For example, the three western-most provinces - British Columbia, Alberta and Saskatchewan - had only one CEO without a contract out of 31 school boards reporting (about 3%). However, in the three eastern provinces of Newfoundland, Nova Scotia and New Brunswick, 12 of 16 responding boards did not have a contract (75%).

EVALUATION

OF THE 81 school boards that responded to the questionnaire, 21 (26%) did not evaluate their CEOs even informally. The largest number of these non-evaluating boards was in Ontario (6), followed by New Brunswick (4) and Newfoundland (3). These three provinces accounted for 62% of all non-evaluating boards (see Appendix 1).

Examined geographically, we find that all the responding school boards in Prince Edward Island and Northwest Territories evaluated their CEOs. Nearly 95% of the school boards in Alberta (16 out of 17) evaluated their CEOs, and Saskatchewan and Quebec each reported four out of five boards (80%) in the same category. The province with the fewest evaluating boards was Newfoundland (only 1 in 4), followed by New Brunswick (4 of 8) and Ontario (6 of 19, or nearly 1/3).

There is no strong geographical pattern to this, however there does appear to be a trend towards greater evaluation in the western provinces than in the east. This is not a very strong trend however; consider that Manitoba has a non-evaluation rate of nearly 30% (2 of 7 boards).

EVALUATING AND CONTRACTS: A COMPARISON

OF THE 81 school boards responding, two-thirds of the CEOs had contracts (54), and of these, 85% (46) were evaluated by their boards. In other

words, fewer than 15% of those CEOs with contracts were not evaluated. These latter were situated in Ontario and British Columbia (2 each), followed by Newfoundland, Nova Scotia, Manitoba and Saskatchewan (one each).

One-third of the CEOs responding (27) had no contract with their boards, but these were almost evenly divided between boards that evaluated them (14) and those that did not (13).

CEOs: Evaluations and Contracts

	Replies	CEOs without Eval	No Contract No Eval	No Contract & Eval	Contract No Eval	Contract & Eval
NWT	1	0	0	0	0	1
NFLD	4	3	2	1	1	0
PEI	2	0	0	0	0	2
NS	4	1	0	1	1	2
NB	8	4	4	4	0	0
QUE	5	1	1	4	0	0
ONT	19	6	4	3	2	10
MAN	7	2	1	1	1	4
SASK	5	1	0	0	1	4
ALTA	17	1	1	0	0	16
BC	9	2	0	0	2	7
TOTAL	81	21	13	14	8	46

EVALUATION MODELS AND GUIDELINES

FEWER than one-third of the school boards responding to the questionnaire had a formal evaluation form for the CEO performance review. (See Appendix 3). Of these 26 school boards, several models were extremely complex and sophisticated while others were relatively simple. Another ten school boards returned written guidelines to help the evaluators rate the performance of the CEOs. Some of these guides were quite sophisticated, being nearly full-blown evaluation forms, while others were little more than statements affirming the need to evaluate the CEOs periodically.

With the more complex guidelines, it was sometimes difficult to decide whether to place them in the guide category or in the model one. The rule of thumb used to divide the two was simply whether the written document was logically arranged in a series of questions about the CEO's performance. All those with a series of questions arranged on a form, with

appropriate spaces for answers, were considered as evaluating instruments. This is an arbitrary rule which on the one hand includes a simple one page, five-question form for evaluating a CEO, but excludes the 79-page, comprehensive and sophisticated Saskatchewan School Trustees Association's "Director Appraisal: A Performance-Based Manual For School Boards and Directors of Education," simply because it does not have such an evaluation instrument.

Most of the 26 models included in this category are sophisticated, complex evaluating instruments covering all aspects of the CEO's performance. Many even include a quantifiable scale to allow the evaluator to rate the CEO's performance more accurately.

LEVELS OF EVALUATION

THOSE superintendents and directors of education who were evaluated were asked how this was carried out. There are three main levels of evaluation: 1) Formal evaluation using a standard evaluation instrument, often (but not always) with a quantifiable rating scale; 2) Formal evaluation using descriptive guides but without a standard model or set form; 3) Informal evaluation, using neither guides nor models.

These three categories of evaluation are not rigid or even necessarily mutually exclusive. They tend to blur at their boundaries. For example, a school board might have a general guide for evaluating their CEO but may approach the process very informally, while another board might use a very similar guide but evaluate quite formally. In general, however, it would seem that the greater the amount of time invested in drawing up an evaluation instrument, the more importance the school board attaches to the evaluation.

MODELS: RATING SCALES

OF THE 26 school boards with formal evaluation models, four do not include a quantifiable rating scale (Grand Falls, N.B.; Barrington Passage, N.S.; and Jasper and Ryley, Alta.) and one other (Red Deer, Alta.) uses two different scales.

The 21 remaining evaluation models use either a three-, four-, or five-point evaluating scale. About one-quarter of these (5) preferred the four-point system; the rest were evenly divided between three- and five-level rating scales (8 each).

The typical three-tiered rating scale has some variation of the categories excellent, satisfactory, unsatisfactory. There are slight variations in phrasing: "performance exceeds expectation," "significant strength" or "commendable" are all used to mean excellent, and a common variant of satisfactory is "performance meets expectation."

The four-point scale is simply an extension of this to include "excellent," "good," "satisfactory," "less than satisfactory," and the five-point scale generally is expanded to include a category such as "outstanding." For example, the Red Deer (Alta.) five-point rating scale is typical: "unacceptable," "satisfactory," "good," "excellent," "outstanding."

The Sturgeon School Division (Morinville, Alta.) employs a four-point evaluating system which is somewhat more complex than the average. Four different descriptive evaluators are used in each of the 24 questions in their model. For example: #13 Budget Preparation:

a) budget preparation is an outstandingly effective operation
b) preparing the budget is done with care and accuracy
c) several problems are usually encountered in preparing budgets
d) budget preparation is one of the poorest operations done

The Port aux Basques Integrated School Board (Nfld.) employs what at first glance appears to be a standard five-point rating scale, however, the inclusion of the "provision for half-point intervals" makes this actually a ten-point scale. In addition, an evaluation profile graph (see Appendix 2) allows the person evaluating to bring together all the scores to the 53 questions on one page.

QUALITATIVE COMMENTS

DUE TO THE increasing complexity of the duties of most CEOs, their evaluations must of necessity be quite involved. More than a third (9) of the 26 school boards with evaluation instruments, have in excess of 50 questions in their models, and two boards have 73 questions. The many duties of the CEO have led to a large quantity of questions in most evaluations, and numerical rating scales are indispensable in most cases. There is no way to synthesize this amount of material without some kind of quantification.

However, most school boards prefer the most flexible method of evaluation. No one wants to see a cold, heartless, purely "objective" evaluation, in which so many "exceptionals" plus a certain number of "goods," several "satisfactories," and perhaps even a few "unacceptables," will sum up the CEO.

This is undoubtedly why every single evaluation model includes some space for personal, subjective, qualitative comments. The 26 evaluation models all include room for subjective comments. A small minority - less than one-quarter - leave room for comments only at the end of the entire form. All the other instruments leave space for comments after each question, and nearly 40% (10 of 26) leave comment space after every question and at the end of the form. In every single case, evaluators are encouraged to add their own personal comments in addition to the quantitative ratings of the formal evaluation models. For

example, the Assiniboine South School Division (Winnipeg) instructs its evaluators to "supplement the review with anecdotal comments as deemed necessary." All evaluation reports are drawn together and a composite is developed, and the final report, to the board and the CEO, is presented in a written form which allows for qualitative input from the evaluators.

CATEGORIES OF QUESTIONS

THE 26 EVALUATION models of school boards have a total of nearly 1000 questions! (See appendix 3.) Studying the groupings of these questions, we find that they can be arranged in approximately 18 categories. These categories are by no means hard and fast, much less engraved in stone, and although there is a certain amount of agreement among the boards, there is also a fair amount of disagreement. This is hardly surprising, given the diversity of situations across Canada. Local conditions and needs will play an extremely important, often determining, part in the design of any questionnaire. This is why, when a school board borrows an evaluation instrument from another board, more often than not they will adapt it to local conditions.

Over one-third of the boards with evaluation models do not bother with categories or divisions, and, as a general rule, these tend to be the smaller evaluations. In fact, the nine models with no categories average about 13 questions each, which is only about one-third the average size of all evaluating models. It stands to reason that evaluations with fewer questions do not need internal divisions as much as the larger instruments. However, there is no strong correlation between questionnaire size and the number of categories used. The largest models with 73 questions use eight categories, while another model with 52 questions uses 16. And, at the same time, those models which use three divisions range from 18 to 46 to 63 questions.

The average size of an evaluation model is about 35 questions; however, they range from five to 73 questions.

Major Categories Used in CEO Questionnaires

1. Board Relations
2. Community and Public Relations
3. Staff and Personnel
4. Curriculum
5. Student Services
6. Business and Fiscal
7. Facilities and Physical Plant
8. Professional and Personal Development
9. Communication
10. Leadership
11 Management Style
12. Relationships
13 Perceptiveness
14. Personal Qualities
15. Resource Allocation
16. Goal Achievement / Planning
17. Policy Development
18. Miscellaneous

QUALITIES AND ATTRIBUTES OR OBJECTIVES?

IT IS DIFFICULT to compare precisely the different categories and questions in the various evaluations. (See Appendix 3.) Because of the diversity of models and the variety of approaches, it is rare that evaluations coincide exactly. There is inevitably some overlap between categories, and different concerns lead to different models. Some evaluations concentrate on the tasks and duties of the CEO; others stress the skills needed to be successful in that position. Some evaluations focus on the goals and objectives set for and by the CEO, while others see attributes like attitude or ambition as important.

Despite all these *caveats*, most evaluating boards would agree that there are certain significant qualities that the CEO must have. Things like creativity, judgement, openness, trustworthiness, analytical ability, enthusiasm, etc., appear over and over in these evaluation models. Although there is some agreement on the role of the CEO, there are still subtle differences of emphasis in each evaluation.

First and foremost, the CEO is a manager and a leader, which is reflected in the large number of categories involving Leadership, Management, Facilities Management, Business and Fiscal Management, Planning, Goal Achievement, Policy Development, etc. The CEO must also be an effective communicator as shown in the categories such as Communication, Community and Public Relations, etc. He must also be good with people - Relationships, Staff and Personnel Relations, Student Relations, etc. It will surprise no one that almost every school board rates the relationship between the superintendent and the board as central and crucial.

Attempting an exact analysis or comparison of the various models is not easy because of the various approaches used and the fact that certain categories overlap. For instance, why does one school board emphasize Communication, while another emphasizes Community and Public Relations, when they can be, and often are, the exact same thing? Should budgeting fall under Business and Fiscal Management, under Management, or under another category? Each school board sets its own priorities and emphasizes certain areas, and often the definition of what to include in a certain category will vary simply because of personal preference.

MANAGEMENT BY OBJECTIVE

MANAGEMENT by Objective (MBO) is one of the hottest topics in recent discussions of planning and evaluation. Imported from the corporate world, MBO is an important element in modern management theory. It has important applications and implications for education. As in the corporate world, the school board and the CEO *together* define a set of goals and objectives for the organization. Specific responsibilities, deadlines, etc. are established and performance criteria are set. Success

(or failure) can be accurately measured and alternative plans employed where necessary.

Seventeen school boards specifically mentioned annual objectives in their policy statements, and several went to great lengths to explain the theory and rationale behind the use of annual objectives. A few school boards even included methods to assess objectives in their evaluation models. For example, the policy statement guidelines of School District 25, Oromocto (N.B.), specifically outline four areas for consideration in the annual performance appraisal of the superintendent's activities with regard to: a) job description, b) annual objectives, c) additional tasks, and d) relationships with the board, ministry, staff, parents, the public, etc.

The Calgary Board of Education notes that: "Specific objectives should be set and assessed every year. For example, although the chief superintendent is always responsible for ensuring that the organization operates within a budget, specific budget control objectives will be changed each year." Many boards include sections in their evaluation models which ask trustees to identify "areas which need more attention," but only a very few boards actually spell out which objectives are to be evaluated, much less how. In the evaluation model of Dryden (Ont.) five goals are identified and are assessed as Fully Achieved, Partially Achieved, or Not Achieved. The Goal Setting Chart (see Appendix 4) from Grand Falls (N.B.) is one of the most elaborate models employed by any school board.

FREQUENCY OF REVIEWS

CEO EVALUATIONS generally take place annually, but the time span ranges from once every four years to three times per year. Of the 57 school boards that answered these questions, nearly 80% of them (43) had a formal annual evaluation. Most of the others still had some form of yearly evaluation, although the formal reviews took place less frequently.

Most school boards (80%) saw no relation whatsoever between the frequency of the evaluations and the length of the CEO's contract. However, five boards in British Columbia saw a strong relationship between the two. A typical comment was that of the Brandon (Man.) School Division : "Generally job evaluations or a discussion of job performance is a part of salary negotiations." In Burnaby (B.C.), there is a "provision for the automatic renewal of the contract after each annual review, if not precluded by board action."

Although the connection is by no means obvious, most boards would probably agree with the Seven Oaks School Division (Winnipeg) that "there has to be a relation there somewhere."

EVALUATION: WHO REQUESTS IT?

ON THE QUESTION of who requests the CEO's evaluation, over half of the responding boards reported that they had provisions for a performance review or evaluation of the CEO written into the contract or in the board policy guidelines. The boards that did not have this were fairly evenly divided between those in which the request for the review came from the CEO and those in which it came from the board itself.

WHO PARTICIPATES IN THE REVIEW?

WHO TAKES PART in the evaluation of the CEO? The great majority of school boards (nearly 70%) reported that the whole board is involved in the evaluation of the CEO. The handful of boards that had special committees for the CEO review were all in five provinces, and nearly three-quarters of them were in Ontario and Quebec.

It is interesting that all the responding Quebec school boards (4) used a review committee rather than the entire board to evaluate their CEOs, and that 40% of Ontario school boards (5 of 13) had special committees for evaluation of the CEO. The few other cases of committee review were reported in Alberta (2 of 16), Nova Scotia and Saskatchewan (1 each). In most cases, even those school boards with special evaluation committees eventually presented their evaluations to the entire board for discussion and review.

Some school boards attempt to include people other than the trustees in the evaluation process. In Charlottetown (P.E.I.), questionnaires are sent throughout the "educational community," and in Bonnyville (Alta.), the board has experimented with various methods, most recently involving a "questionnaire distributed to each building principal." In Yellowknife (NWT), the evaluation form is completed by "board members, principals and central office administrators."

A few school boards find using people from outside the system to be helpful. For example, Seven Oaks School Division (Winnipeg) uses "an external facilitator, who writes the final report" after attending the assessment meeting of the board. Similarly, at the Calgary Board of Education, a consultant produces the summary statement after reviewing the annual objectives and the written comments of the trustees.

In Parksville (B.C.), the annual trustee evaluation of the CEO is supplemented every five years "at the time of contract renewal" - with a formal review conducted by two external facilitators, one from the Ministry of Education and another from a consulting firm. Similarly, in Charlottetown, a "formal comprehensive evaluation of the superintendent of education, involving objective external assistance" takes place every five years.

The average number of people taking part in the CEO evaluations was just slightly under ten people per board. However, these review bodies ranged in size from two people to 26. Generally there seems to be a geographic trend with larger reviewing bodies in eastern Canada -

Newfoundland, Nova Scotia and Prince Edward Island average 15 to 16 persons - and smaller ones in the west - British Columbia and Alberta average only about seven on their review bodies.

There are, of course, some exceptions: Quebec averaged just six members on their review committees (none of these constituted the whole board) and Ontario was well above the average with more than 12 persons per review body.

A FEW OTHER FACTORS

HALF A DOZEN school boards reported that an important part of the evaluation process involved a self-evaluation by the director or superintendent of education. In every case, this self-evaluation was used as a way to launch discussions leading to the final assessment. The boards that reported this were Oromocto (N.B.), London (Ont.), East York, Saskatoon, and Calgary, Leduc and St. Albert (Alta.).

Many school boards chose the informal, less structured approach because of a positive preference. For example, in Montague (P.E.I.), formal evaluation is not done, although "the process is outlined in the contract if the board wishes to use it." Several CEOs mentioned that they are constantly being judged and evaluated by public opinion. In the words of the Montague board: "Everyday, in every move, every statement, you are being evaluated by someone. Unfortunately this is very, very subjective."

The attitude of many boards is probably summed up by the statement from Peace River (Alta.): "The board doesn't like doing the formal evaluation . . . they wouldn't have difficulty in doing this when things are going wrong, but when there are no obvious problems, they don't see a need."

Although it is probably "common practice" in most performance reviews, only about a dozen school boards actually provide space on their evaluation forms for the CEO to answer any allegations or clarify any misunderstandings in writing. Some, like the Calgary Roman Catholic Separate School District, go out of their way to solicit comments. They provide nine different spaces - at the end of each individual section and after the whole evaluation - and comments "related to any performance area are strongly encouraged when ratings other than commendable or competent are given." Others boards, like those in Winkler (Man.), Fort McMurray, Jasper or Ryley (Alta.), require the superintendent's signature at the end of the form and leave ample space specifically for his comments.

CONCLUSION

MOST Canadian school boards - in our sample, about three-quarters - evaluate their Chief Executive Officers. Why do they do so?

The theory behind the evaluation process, though sometimes complex, can be reduced to a few elements. Basically, evaluation is seen primarily not as an instrument of censure, but a method to improve the overall planning process. Viewed this way, evaluation can help the school board define its needs, its goals, the roles and relationships of the participants, as well as the responsibilities, and can point to ways to achieve all this. This is a tall order and it is far more involved than just "making sure that George is earning his keep."

The "simple" evaluation of the CEO, even using some of the more intricate models discussed in this report, is often just the tip of the iceberg. The CEO evaluation is only one part of the planning process which examines the functioning of the entire school system.

Leading edge theory sees the planning process as multifaceted. Once the need for planning has been established - and some people will *not* find any need - the process advances in several stages which might include setting goals and objectives; deciding on the method of execution; establishing time-frames and schedules; outlining methods of measuring success; evaluating progress at specified times, and possibly, redefining plans to more fully achieve the original objectives.

Evaluating the CEO is a part of the planning process. The evaluation ideally will help to define the role of the CEO, as well as the other players in the system. Responsibilities are often outlined in a written job description, which, in turn, can serve as the basis for the establishment of objectives and goals. But, because both job descriptions and objectives are complex and situationally specific, much of the discussion of CEO evaluation has focused on the models or instruments used in the actual performance review. What kinds of questions are asked? What is considered important? Evaluation questionnaires generally reflect local concerns and vary accordingly.

There is no single correct model or method. Each one has merits as well as drawbacks, and it is up to each individual school board to decide what its needs are and proceed from there. The decision to get started is often the most difficult thing in the whole process.

SOME SUGGESTED READINGS

Boich, John W. et. al. (eds.). *The Canadian School Superintendent* (Toronto: OISE, 1989).

Booth, Ronald R. & Gerald R. Glaub. *A Superintendent Appraisal System: A Workbook* (Illinois Association of School Boards).

Fullan, Michael. *The Supervisory Officer in Ontario: Current Practice and Recommendations for the Future* (Toronto: Ontario Ministry of Education, 1987).

McLeod, Gerald T. "The Work of School Board Chief Executive Officers," *Canadian Journal of Education* 9:2 (1984), pp. 171-190.

Redfern, George B. *Evaluating the Superintendent* (Arlington, Va: American Association of School Administrators, 1980).

Renihan, F.I. *Director Appraisal: A Performance-Based Manual for School Boards and Directors of Education* (Regina: Saskatchewan School Trustees Association, 1984).

SCHOOL BOARDS RESPONDING TO THE CEO EVALUATION QUESTIONNAIRE

Northwest Territories
Yellowknife, Yellowknife Education District No. 1

Newfoundland
Goose Bay, Labrador East Integrated School Board
Labrador City, Labrador West Integrated School Board
Port Aux Basques, Port Aux Basques Integrated School Board
Stephenville, Port-Au-Port Roman Catholic School Board

Prince Edward Island
Charlottetown, Regional Administrative Unit 3
Montague, Regional Administrative School Unit 4

Nova Scotia
Barrington Passage, Shelburne County District School Board
Dartmouth, Dartmouth District School Board
Halifax, Halifax County-Bedford District School Board
Halifax, Halifax District School Board

New Brunswick
Bathurst, District scolaire n°. 41 (Jérôme Boudreau)
Dalhousie, School District No. 36
Grand Falls, School District No. 50
Moncton, School District No. 15
Oromocto, School District No. 25
Sackville, School District No. 14
Saint John, School District No. 20
Saint-Quentin, District scolaire n°.1

Québec
Montréal, Conseil scolaire de l'île de Montréal
Pointe-Claire, Commission scolaire Baldwin-Cartier
Québec, Commission des écoles Catholiques de Québec
Sept-îles, Commission scolaire de Sept-îles
Ville St.-Georges, Commission scolaire régionale de la Chaudière

Ontario
Aurora, York Region Board of Education
Belleville, Hastings-Prince Edward County Separate School Board
Brockville, Leeds-Grenville County Board of Education
Burlington, Halton Board of Education
Cornwall, Stormont, Dundas & Glengarry County Board of Education
Dryden, Dryden Board of Education
Guelph, Wellington County Board of Education
Kingston, Frontenac-Lennox & Addington Separate School Board
London, London Board of Education
Mississauga, Peel Board of Education
Ottawa, Ottawa Board of Education
Pembroke, Renfrew County Roman Catholic Separate School Board
Sarnia, Lambton County Board of Education

Thunder Bay, Lakehead Board of Education
Timmins, Timmins Board of Education
Timmins, Timmins District Roman Catholic Separate School Board
Toronto, East York Board of Education
Willowdale, Metropolitan Separate School Board
Windsor, Windsor Roman Catholic School Board

Manitoba
Brandon, Brandon School Division No. 40
Flin Flon, Flin Flon School Division No. 46
Winkler, Garden Valley School Division No. 26
Winnipeg, Winnipeg School Division No. 1
Winnipeg, Assiniboine South School Division No. 3
Winnipeg, River East School Division No. 9
Winnipeg, Seven Oaks School Division No. 10

Saskatchewan
Moose Jaw, Moose Jaw School Division No. 1
Regina, Regina School Division No. 4
Saskatoon, Saskatoon School Division No. 13
Saskatoon, Saskatoon Roman Catholic Separate School Division No. 20
Warman, Saskatchewan Valley School Division No. 49

Alberta
Bonnyville, Lakeland Public School District No. 5460
Brooks, County of Newell No. 4
Calgary, Calgary Board of Education
Calgary, Calgary Roman Catholic Separate School District No. 1
Edmonton, Edmonton Public School Board
Edmonton, Edmonton Catholic School District No. 7
Fort McMurray, Catholic Board of Education, School Division No. 32
Jasper, Jasper School District No. 3063
Leduc, Leduc School District No. 297
Lethbridge, Lethbridge School District No. 51
Lethbridge, Lethbridge Catholic Separate School District No. 9
Morinville, Sturgeon School District No. 24
Peace River, Peace River School District No. 10
Red Deer, Red Deer Public School District No. 104
Ryley, County of Beaver No. 9
St. Albert, St Albert School District No. 3
Sherwood Park, Strathcona County Board of Education

British Columbia
Abbotsford, Abbotsford School District No. 34
Burnaby, Burnaby School District No. 41
Delta, Delta School District No. 37
Parksville, Qualicum School District No. 69
Powell River, Powell River School District No. 47
Squamish, Howe Sound School District No. 48
Surrey, Surrey School District No. 36
Vancouver, Vancouver School District No. 39
Vanderhoof, Nechako School District No. 56

LIST OF APPENDICES

Appendix 1

Contracts and CEOs
Evaluation of CEOs by Province /18

Appendix 2

Evaluation Profile (Port aux Basques, Nfld.) /18

Appendix 3

Major Categories Used in CEO Evaluations /19
The 26 School Boards with Evaluation Models /19
School Boards with Policy Statements /19

Appendix 4

Goal Setting Charts (Grand Falls, N.B.) /20

Appendix 5

Evaluation Models
Model No. 1 - Yellowknife Education District, NWT /22
Model No. 2 - Garden Valley School Division, Winkler, Man. /25
Model No. 3 - Dartmouth District School Board, N.S. /28

Appendix 6

Comparison of Six Similar Evaluation Models /31

APPENDIX 1

CONTRACTS AND CEOs

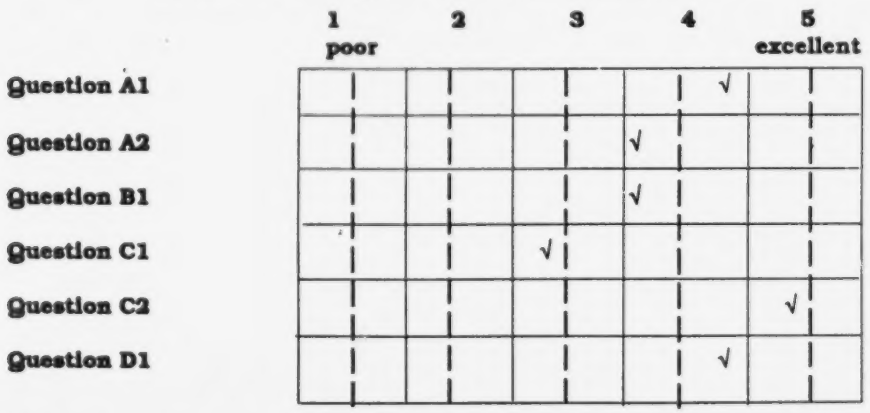
	Replies	Contracts	No Contracts	% with Contract
NWT	1	1	0	0
NFLD	4	1	3	75
PEI	2	2	0	0
NS	4	3	1	25
NB	8	0	8	100
QUE	5	0	5	100
ONT	19	12	7	37
MAN	7	5	2	29
SASK	5	5	0	0
ALTA	17	16	1	6
BC	9	9	0	0
Total	81	54	27	50

EVALUATION OF CEOS BY PROVINCE

	Total replies	CEOs not eval.	%
NWT	1	O	100
NFLD	4	3	25
PEI	2	0	100
NS	4	1	75
NB	8	4	50
QUE	5	1	80
ONT	19	6	68
MAN	7	5	71
SASK	5	1	80
ALTA	17	1	94
BC	9	2	78
Total	81	21	74

APPENDIX 2

PORT AUX BASQUES EVALUATION PROFILE



The Port aux Basques Integrated School Board (Nfld.) employs what at first glance appears to be a standard five-point rating scale, however, the inclusion of the "provision for half-point intervals" makes this actually a ten-point scale. In addition, an evaluation profile graph allows the person evaluating to bring together all the scores to the 53 questions on one page.

NOTE: The check marks are shown as an example only. This is not an *actual* evaluation.

APPENDIX 3

MAJOR CATEGORIES USED IN CEO EVALUATIONS

	1	2	3	5	6	7	*8	9	10*	13	15	19	21	23	24	25
1. Board Relations	√	√		√	√	√						√	√	√	√	√
2. Community and Public Relations	√	√			√	√						√	√	√	√	√
3. Staff and Personnel	√	√			√	√						√	√	√	√	√
4. Curriculum	√	√			√	√						√	√		√	√
5. Student Services	√	√			√						√	√		√		
6. Business and Fiscal	√	√		√	√					√	√		√	√		
7. Facilities /Physical Plant	√	√		√						√	√	√	√	√		
8. Professional/Personal Development	√	√			√											
9. Communication			√	√		√	√	√		√	√		√			
10. Leadership			√	√		√	√	√		√	√					√
11. Management Style			√	√			√	√		√	√			√		
12. Relationships			√				√	√		√	√		√			
13. Perceptiveness			√				√	√								
14. Personal Qualities			√	√		√	√	√		√	√					√
15. Resource Allocation			√													
16. Goal Achievement/ Planning			√	√	√	√	√	√		√	√		√		√	
17. Policy Development				√		√						√				
18. Miscellaneous													√		√	√

NOTE: These numbers correspond to the school boards listed below.

* #7 Brooks, Alta., has 6 categories which can be included as Personal Qualities
* # 10 Winkler, Man., has an instrument of 47 questions in 11 categories. It is so original that its categories do not fit with these "standard" ones.
School boards not included in this chart either do not have any categories in their questionnaires, or the ones they use do not correspond to the ones used here.

THE 26 SCHOOL BOARDS WITH EVALUATION MODELS

1) Yellowknife, NWT
2) Vanderhoof, BC
3) Dartmouth, NS
4) Calgary (Sep)
5) Sarnia, Ont
6) Port Aux Basques, Nfld
7) Brooks, Alta
8) Guelph, Ont
9) Pembroke, Ont
10) Winkler, Man
11) Dryden, Ont
12) Peace River, Alta
13) Thunder Bay, Ont
14) Winnipeg
15) Burlington, Ont
16) Saskatoon (Sep)
17) Red Deer, Alta
18) Morinville, Alta
19) Edmonton
20) Jasper, Alta
21) Grand Falls, NB
22) Sackville, NB
23) Abbotsford, BC
24) Barrington Passage, NS
25) Fort McMurray, Alta
26) Ryley, Alta

SCHOOL BOARDS WITH POLICY STATEMENTS

1) Charlottetown, PEI
2) Oromocto, NB
3 Montréal
4) Pointe-Claire, Que
5) Moose Jaw, Sask
6) Saskatoon
7) Warman, Sask
8) Calgary
9) St. Albert, Alta
10) Surrey, BC

APPENDIX 4

GOAL SETTING CHARTS

Purpose: Each Goal Setting Chart identifies one role and/or responsibility of the superintendent. The Goal Setting Charts shall deal with the total operation of the school district.

The school district operations are as follows:

1) Board/superintendent relationships
2) Liaison with the Department of Education and other agencies
3) Personnel relations
4) Curriculum instruction
5) Student performance and demeanor
6) Committee participation
7) Fiscal management
8) Plant management
9) Routine management
10) Long range planning
11) Community relations
12) Special research projects

Each Goal Setting Chart will include the following headings:

1) School District operation
2) Superintendent's job description
3) Goal statement/date initiated
4) Priority rating
5) Objective
6) Completion date
7) Statement of how goal is to be accomplished
8) Follow-up

Evaluation criteria (goals and objectives) are explicit, encourage objective judgements, and relate as much as possible to those performances and behaviours by the superintendent that bear directly on the purposes and responsibilities of the position.

From: School District No. 50 (Grand Falls, N.B.)

APPENDIX 5

EVALUATION MODELS

Model No. 1 - Yellowknife Education District, NWT

Model No. 2 - Garden Valley School Division, Winkler, Man.

Model No. 3 - Dartmouth District School Board, N.S.

MODEL NO. 1:
YELLOWKNIFE EDUCATION DISTRICT, NWT
SUPERINTENDENT'S PERFORMANCE EVALUATION

Superintendent's Name _____ School Year _____

Process: Each trustee is to fill out the following questionnaire and return it to the Superintendent's Evaluation Committee by _____ . The Superintendent's Evaluation Committee will develop a composite of the results and meet with the board to discuss the results. A meeting will then be held with the superintendent to finalize the draft of the evaluation.

Directions: Circle the appropriate symbol in the assessment column. If some aspect of the superintendent's performance merits particular comment, please comment. Finally, circle the overall rating for each section.

Assessment Symbols - 4-point rating scale:

1 = Less than Satisfactory: performing below acceptable standards and expec tations; ranks in the 0 to 1st percentile of performance (0% to10% range of performance);

2 - Satisfactory: adequate performance and may need some improvement but not critical; ranks in the 1st to 5th percentile of performance (10% to 50% range of performance)

3 -Good: consistently performs to expectations; ranks in the 5th to 9th percentile of performance (50% to 90% range of performance)

4 - Excellent: excels, outstanding and exceeds expectations; ranks in the 9th to 10th percentile of performance (top 10% in performance)

I) BOARD RELATIONS AND RESPONSIBILITIES (11 quests)	
1) Prepares carefully for Board meetings	4 3 2 1
2) Provides ample information to enable Board members to make decisions	4 3 2 1
3) Involves staff members in Board meetings	4 3 2 1
4) Is responsive to concerns of Board members	4 3 2 1
5) Answers questions of Board members promptly	4 3 2 1
6) Follows up promptly on requests of Board	4 3 2 1
7) Keeps Board fully informed about school operations	4 3 2 1
8) Implements Board policies fully	4 3 2 1
9) Interprets Board policies to staff	4 3 2 1
10) Advises the Board on need for new and /or revised policies and procedures	4 3 2 1
11) Communicates openly and positively with Board	4 3 2 1

Comments _____

22

II) COMMMUNITY AND PUBLIC RELATIONS (9 quests)

1) Handles media relations skillfully	4 3 2 1
2) Maintains good relations with local government leaders	4 3 2 1
3) Interprets district problems and concerns to community and public	4 3 2 1
4) Interprets the educational program to the community	4 3 2 1
5) Responds to concerns of community	4 3 2 1
6) Communicates periodically to the community	4 3 2 1
7) Handles parental concerns	4 3 2 1
8) Handles pressure groups skillfully	4 3 2 1
9) Relations are positive	4 3 2 1

Comments _____

III) STAFF PERSONNEL MANAGEMENT (9 quests)

1) Delegates responsibilities and authority to others	4 3 2 1
2) Conducts employee relations skillfully	4 3 2 1
3) Sets standards of staff performance and expectations	4 3 2 1
4) Attracts and selects qualified personnel	4 3 2 1
5) Administers personnel procedures fairly	4 3 2 1
6) Supports or recommends an attractive but realistic salary and benefits program for employees	4 3 2 1
7) Administers a comprehensive evaluation program of staff	4 3 2 1
8) Staff relations are positive and operate smoothly	4 3 2 1
9) Encourages staff personal growth	4 3 2 1

Comments _____

IV) CURRICULUM AND INSTRUCTIONAL MANAGEMENT (10 quests)

1) Is knowledgeable and up-to-date in curriculum and instructional trends and developments	4 3 2 1
2) Is effective in short and long range planning in curriculum and instructional matters	4 3 2 1
3) Initiates new programs, modifies existing ones and discontinues others	4 3 2 1
4) Monitors effectiveness of instructional programs	4 3 2 1
5) Ensures supervision of instruction	4 3 2 1
6) Assesses effectiveness of instructional programs	4 3 2 1
7) Plans and directs inservice and staff development	4 3 2 1
8) Implements and ensures territorial policies are met	4 3 2 1
9) Educational needs are assessed and accurate	4 3 2 1
10) Student assessment programs are thorough and evaluated	4 3 2 1

Comments _____

V) MANAGEMENT OF STUDENT PROCEDURES (7 quests)

1) Provides comprehensive student personnel services	4 3 2 1
2) Manages enrolment and attendance policies and procedures	4 3 2 1
3) Manages student behaviour and discipline procedures	4 3 2 1
4) Provides for health and safety of students	4 3 2 1
5) Ensures liaison with community agencies concerned with student services	4 3 2 1

6) Handles student personnel problems effectively 4 3 2 1
7) Manages student assessment program 4 3 2 1

Comments _____

VI) BUSINESS AND FISCAL MANAGEMENT (7 quests)

1) Determines educational financial needs of district 4 3 2 1
2) Forecasts financial requirements 4 3 2 1
3) Budget preparation 4 3 2 1
4) Manages budget allocations and expenditures 4 3 2 1
5) Manages cost accounting and cost effectiveness 4 3 2 1
6) Ensures effective procedures for procurement of equipment, materials etc. 4 3 2 1
7) Current financial information is available 4 3 2 1

Comments _____

VII) FACILITIES MANAGEMENT (6 quests)

1) Plans and provides physical facilities 4 3 2 1
2) Manages the maintenance of buildings and grounds 4 3 2 1
3) Provides for security and safety of personnel and property 4 3 2 1
4) Plans for and manages modification, renovations, expansions, and discontinuation of facilities 4 3 2 1
5) Directs the utilization of facilities 4 3 2 1
6) Ensures that the facilities are clean and have good appearance 4 3 2 1

Comments _____

VIII) PROFESSIONAL AND PERSONAL DEVELOPMENT (14 quests)

1) Is effective in working with territorial leaders 4 3 2 1
2) Maintains effective working relationship with Department of Education 4 3 2 1
3) Knows how to pace self 4 3 2 1
4) Keeps self physically fit 4 3 2 1
5) Maintains good mental health 4 3 2 1
6) Engages in activities to promote own professional growth and development 4 3 2 1
7) Contributes to profession by writing and speaking 4 3 2 1
8) Keeps self current professionally 4 3 2 1
9) Is accountable for actions 4 3 2 1
10) Participates in provincial and national organizations 4 3 2 1
11) Provides leadership 4 3 2 1
12) Interpersonal relationships 4 3 2 1
13) Personal qualities 4 3 2 1
14) Is dedicated and committed to the job 4 3 2 1

Comments _____

The overall rating on the superintendent is:
Excellent Good Satisfactory Less than Satisfactory

MODEL NO. 2:
GARDEN VALLEY SCHOOL DIVISION
WINKLER, MAN.

Name of Employee	Position	Date of Review

ASSESSMENT BY : _____ (NAME)

_____ (TITLE)

A = Outstanding B = Good C = Average
D= Requires Improvement E = Unsatisfactory

CHARACTERISTICS REVIEWED

1) KNOWLEDGE OF THE JOB (6)	
1) Extent of knowledge of the detailed procedures of job	A B C D E
2) Extent of knowledge of the detailed procedures of related work	A B C D E
3) Extent of knowledge of the detailed procedures of the policies of the organization as they relate to job	A B C D E
4) Extent of knowledge of the detailed procedures of the policies of the organization as they relate personally	A B C D E
5) Adherence to Public Schools Act	A B C D E
6) Communication (What's happening in the Division)	A B C D E

Remarks: _____

2) ANALYTICAL REASONING ABILITY (PROBLEM SOLVING) (2)	
7) Skill in interpreting and responding to situations or problems	A B C D E
8) Skill in examining possible explanations and alternative courses of action and arriving at sound and logical conclusions	A B C D E

Remarks: _____

3) DEPENDABILITY (5)	
9) Willingness to accept responsibility	A B C D E
10) Conscientiousness and reliability in execution of assignments	A B C D E
11) Objectiveness	A B C D E
12) Perservance	A B C D E
13) Loyalty to the organization	A B C D E

Remarks: _____

4) SUPERVISORY ABILITY (5)

14) Ability to teach and develop people	A	B	C	D	E
15) Ability to create enthusiasm for a task and for the group effort	A	B	C	D	E
16) Ability to create and maintain harmonious working relationships within a group	A	B	C	D	E
17) Evaluation of staff	A	B	C	D	E
18) Placement of staff	A	B	C	D	E

Remarks: _____

5) EXECUTIVE ABILITY (6)

19) Ability to plan and organize work and the work of others	A	B	C	D	E
20) Ability and willingness to exercise initiative in the absence of instructions or precedent	A	B	C	D	E
21) The courage to make decisions	A	B	C	D	E
22) Ability to delegate responsibility and authority	A	B	C	D	E
23) Long range planning	A	B	C	D	E
24) Financial management	A	B	C	D	E

Remarks: _____

6) INITIATIVE (3)

25) Degree of push and drive displayed to get results	A	B	C	D	E
26) Ability to originate ideas	A	B	C	D	E
27) Ability to get things started and developed	A	B	C	D	E

Remarks: _____

7) RECEPTIVENESS AND ADAPTABILITY (4)

28) Willingness to consider the proposals of others	A	B	C	D	E
29) Willingness to offer constructive criticism to the proposals in a diplomatic manner	A	B	C	D	E
30) Willingness to accept and adopt changes having merit	A	B	C	D	E
31) Ability to adjust rapidly to new ideas and changes	A	B	C	D	E

Remarks:_____

8) SKILL IN HUMAN RELATIONS (5)

32) Ability to get along with staff	A	B	C	D	E
33) Ability to get along with public	A	B	C	D	E
34) Consideration for others and tact in personal dealings with others	A	B	C	D	E
35) Interest in the welfare and happiness of associates	A	B	C	D	E
36) A sense of justice and fair play	A	B	C	D	E

Remarks:_____

9) APPEARANCE AND PERSONALITY (4)

37) Suitability of appearance and dress	A B C D E
38) Impression created by appearance	A B C D E
39) Impression created by manner	A B C D E
40) Impression created by personality	A B C D E

Remarks: _____

10) ATTITUDE TOWARD THE JOB (4)

41) The degree of enthusiasm for the work and energy which is applied to the job	A B C D E
42) Capacity for identifying own needs with the needs of the organization	A B C D E
43) Co-operativeness with others on matters which do not directly concern him/her as well as on common problems	A B C D E
44) Pride in the job	A B C D E

Remarks: _____

11) PERSONAL AMBITION (3)

45) Willingness to accept or assume responsibility	A B C D E
46) Aggressiveness in seeking higher level of work and responsibility	A B C D E
47) Personal efforts to improve performance on the job and qualifications for advancement	A B C D E

Remarks_____

GENERAL COMMENTS

Evaluator

1. The greatest asset of the employee?
2. Performance characteristics which need improvement with respect to the present position

Employee

3. What further training is planned for development?
4. Assuming your job does not change from what it is today, do you plan to change the way you are now doing your job? How and why?
5. What problems do you have in doing your job?

RATING

_____

_____

REVIEW

A space is provided for the employee to make comments both on the rating and the overall report. The employee should at least state understanding of the content of the report and of what has been said about strengths and weaknesses. Employees are urged to comment freely and fully on how they differ from or concur with the report, their preference about the kinds of work, and their goals.

MODEL NO. 3:
DARTMOUTH DISTRICT SCHOOL BOARD
N.S.

Evaluation of the Superintendent

Instructions: This form is designed to obtain your perceptions of the performance of our superintendent. Your personal opinions and observations are important, so please respond candidly to each item. Your responses will remain anonymous. Results will be compiled on a board basis. Should you be unable to respond to a given statement because you are not aware of the superintendent's performance in relation to it - do not circle any number. This will not be taken as a negative rating. Ratings of 1 require comment. Please add any additional comments you may have.

Please circle the number which best reflects your perception.

	Rarely	Seldom	Sometimes	Often	Consistently
I) COMMUNICATION (9)					
1) Is effective as a communicator	1	2	3	4	5
2) Keeps Board members informed about important matters	1	2	3	4	5
3) Is accessible to me	1	2	3	4	5
4) Listens to me	1	2	3	4	5
5) Has finger on the pulse of the organization	1	2	3	4	5
6) Speaks positively about the good things that can happen in this community	1	2	3	4	5
7) Prepares clear, concise and complete reports	1	2	3	4	5
8) Responds effectively to concerns and issues in the public forum	1	2	3	4	5
9) Communicates well with the public, individually and collectively	1	2	3	4	5

Comments:

II) LEADERSHIP (9)					
1) Works to make this system the best	1	2	3	4	5
2) Maintains a clear and consistent sense of direction	1	2	3	4	5
3) Develops enthusiasm among staff	1	2	3	4	5
4) Takes a stand on school-community issues	1	2	3	4	5
5) Fosters a climate of growth and development	1	2	3	4	5
6) Is obviously a leader	1	2	3	4	5

	Rarely	Seldom	Sometimes	Often	Consistently
7) Sets a good example	1	2	3	4	5
8) Exhibits a clear educational philosophy	1	2	3	4	5
9) Looks for better ways to do things	1	2	3	4	5

Comments:

III) MANAGEMENT STYLE (9)

1) Provides clear roles and high expectations for senior staff	1	2	3	4	5
2) Handles the performance of senior staff effectively	1	2	3	4	5
3) Develops the potential of senior staff	1	2	3	4	5
4) Handles tough situations well	1	2	3	4	5
5) Is oriented toward the organization's success	1	2	3	4	5
6) Is well organized	1	2	3	4	5
7) Manages difficult personnel issues successfully	1	2	3	4	5
8) Demonstrates both fairness and firmness	1	2	3	4	5
9) Is a successful problem solver	1	2	3	4	5

Comments:

IV) RELATIONSHIPS (9)

1) Helps Board members to be more efficient	1	2	3	4	5
2) Unites people toward common goals	1	2	3	4	5
3) Encourages open, two-way interaction	1	2	3	4	5
4) Exhibits strong interpersonal skills	1	2	3	4	5
5) Establishes and maintains positive working relationships	1	2	3	4	5
6) Provides a supportive climate for people	1	2	3	4	5
7) Is diplomatic, yet forceful in expressing his views	1	2	3	4	5
8) Works effectively with other levels of government	1	2	3	4	5
9) Works effectively with NSTU, NSSBA, other Boards and Superintendents	1	2	3	4	5

Comments:

V) PERCEPTIVENESS (3)

1) Uses excellent judgement	1	2	3	4	5
2) Is politically astute	1	2	3	4	5
3) Helps Board members to make good decisions	1	2	3	4	5

Comments:

	Rarely	Seldom	Sometimes	Often	Consistently
VI) PERSONAL QUALITIES (11)					
1) Is trustworthy	1	2	3	4	5
2) Has a high capacity for work	1	2	3	4	5
3) Inspires confidence in his competence	1	2	3	4	5
4) Is optimistic and proactive	1	2	3	4	5
5) Performs well under pressure	1	2	3	4	5
6) Maintains a balanced perspective	1	2	3	4	5
7) Demonstrates personal strength	1	2	3	4	5
8) Demonstrates a high commitment to education and to the needs of the students	1	2	3	4	5
9) Treats Board members with respect	1	2	3	4	5
10) Maintains a good sense of humor	1	2	3	4	5
11) Has a well established value system	1	2	3	4	5

Comments:

VII) RESOURCE ALLOCATION (6)					
1) Emphasizes financial planning	1	2	3	4	5
2) Sets fiscal management goals	1	2	3	4	5
3) Sets realistic budget projections	1	2	3	4	5
4) Encourages regular and accurate financial reporting to the Board	1	2	3	4	5
5) Exhibits sound management of buildings, information, transportation and other material resources	1	2	3	4	5
6) Within budgetary limits is able to allocate resources efficiently and effectively	1	2	3	4	5

Comments:

VII) GOAL ACHIEVEMENT (6)					
1) Sets clear, realistic goals	1	2	3	4	5
2) Communicates these goals clearly to the system	1	2	3	4	5
3) Plans effectively to achieve personal and system goals	1	2	3	4	5
4) Achieves established goals	1	2	3	4	5
5) Regularly evaluates goal achievement	1	3	3	4	5
6) Is a strong proponent of determining needs and developing plans to meet needs	1	2	3	4	5

Comments:

DARTMOUTH DISTRICT SCHOOL BOARDS
SPECIFIC GOALS AND OBJECTIVES

Attached are the goals and objectives as set by the Board for the past year together with the Superintendent's Report indicating the degree of progress. Please comment selectively on the performance of the Superintendent with respect to such individual goals and objectives as you see fit.

_____

_____

_____

APPENDIX 6

A COMPARISON OF SIX SIMILAR EVALUATION MODELS

Categories	Dartmouth	Sarnia	Guelph	Pembroke	Thunder Bay	Burlington	Total	Average
Leadership	9	6	9	9	9	9	51	8.5
Communication	9	14	8	8	6	7	52	8.7
Management Style	9	11	8	8	5	4	45	7.5
Relationships	9	7	7	7	6	6	42	7.0
Perceptiveness	3	0	3	3	0	0	9	
Personal Qualities	11	7	11	11	5	5	50	8.3
Goal Achievement	6	4	5	5	7	6	33	5.5
Policy Development	0	5	0	0	0	0	5	
Resource Allocation	6	0	0	0	0	0	6	
TOTAL QUESTIONS	62	54	51	51	38	37	293	48.8

© 1989

Information Notes are occasional publications of the Canadian Education Association, Suite 8-200, 252 Bloor Street West, Toronto, Ontario M5S 1V5 Telephone (416) 924-7721

Evaluation of Chief Executive Officers in Canadian School Boards est publié en français : *L'évaluation des d.g. dans les commissions scolaires canadiennes.*